



FREE FAMILY TREE TIPS
23 SECRETS TO
ORGANIZE YOUR
GENEALOGY

8 Space-Saving Strategies for Your Genealogy

Record your family history in an special place so family will recognize its value.

Search for digitized versions of large reference books.

Focus on keeping heirlooms that are meaningful to you, and give the others to relatives.

Digitize whenever possible. Purchase back issues of magazines and journals on space-saving CDs and opt for digital conference syllabi.

Don't print all your scanned photos. Print a few cherished ones for display.

Organize family photos in archival albums or storage containers.

Purge papers you don't need, and set up a filing system for the rest.

Store oddly shaped heirlooms in boxes sized to fit.



9 Habits of Highly Organized Genealogists

Follow these strategies — from researchers just like you —
to get your family tree files in order.

BY DANA MCCULLOUGH



3 WHEN MY HUSBAND walks into my home office, he sees tons of paper and chaotic piles covering more than half of my desktop surface. I see organized piles: a pile for items I need to read, a pile for items I need to file, a pile for current projects I'm working on, an appointment book where I write my weekly to-do list and a three-ring binder for the family I'm currently researching. I know exactly what's in each pile, but other people—including my husband and fellow family history buffs—may not understand the method to my organization madness.

Over time, every genealogist has to confront the issue of organization, but the sheer number of ways to organize (and amount of material we collect) can make starting and implementing an organization method intimidating. So we asked our Family Tree Magazine readers to share their best advice and organizational methods to save us from getting buried under mounds of family photos, vital records certificates, census page printouts, family tree charts and other records. We learned a few new tricks from the nine strategies that emerged, and hope you will, too.

1 Keep the big picture in mind.

Most readers' organization systems start with two charts: a family group sheet and a five-generation ancestor chart, which you can download for free at <familytreeuniversity.com/free-family-tree-templates>. Having a large working family tree chart on your wall is also handy.

For Sylvia Weishuhn, this means purchasing a few blank posterboards from the local dollar store and propping them against the wall on her office desk. Weishuhn uses the boards to help clear up

"I've scanned in all my parents' and grandparents' photos to Flickr.com. It only costs me about \$25 per year, and the photos are all safe if my house gets blown away by a tornado." »

Melissa Hull

confusion about her father's large family—he had 12 brothers and sisters. She draws boxes to chart her father's immediate family connections and uses the large chart, along with the listings of parents and siblings in her family tree research binder, to keep everyone on her tree straight.

As an alternative to posterboard, you could hang a large dry-erase board on your wall so you can easily make adjustments to your chart as you learn more about your family, their relationships and major life events. Prices for dry-erase boards vary from about \$38 to \$250, depending on size of the board and whether it's metallic, freestanding or wall-mounted.

FAMILY GROUP SHEET OF THE Family

Source # _____ Source # _____

Full Name of Husband	Birth Date and Place	Source #
His Father	Marriage Date and Place	
His Mother with Maiden Name	Death Date and Place	Burial
Full Name of Wife		
Her Father	Birth Date and Place	
Her Mother with Maiden Name	Death Date and Place	Burial
Other Spouses	Marriage Date and Place	

Children of This Marriage	Birth Date and Place	Death Date, Place and Burial	Marriage Date, Place and Spouse

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FIVE-GENERATION ANCESTOR CHART Chart # _____ Use this chart _____ on chart # _____

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The family group sheet and five-generation ancestor chart, also called a pedigree chart, are two basic forms to help you organize family facts.



Like to organize papers in three-ring binders? Try keeping a separate notebook for each ancestral family or family branch.


2 Take charge of paper files.

Photos. Birth, death and marriage certificates. Printouts of census records. Family tree charts. Newspaper clippings. Paper documents can really pile up, but readers have several ways to tame that plethora of paper.

One option is to use three-ring binders along with plastic sheet protectors and divider tabs. Betty Moren says the plastic sheet protectors can store not only family group sheets and documents, but also cards, newsletters, CDs or DVDs and other mementos. Folders with a pocket are useful to put odd-shaped items in your binder. Another option is to file genealogy papers in a file cabinet using hanging file folders and manila (or colored) file folders.

Some readers have a specific notebook for each family. You can adhere a copy of a family group sheet to the front of the notebook, and use the pages inside to jot down notes as you research. If the notebook has a folder pocket included, you can use it to store copies of documents.

Whether you use a binder, folders or a notebook, Beatrice Hunter recommends alphabetizing the files by surname so you can quickly find the family you want to research. Within each surname folder or



TIP: Adhere a copy of a family group sheet or five-generation ancestor chart to the front of each notebook or binder for easy reference.

binder, Jan Rogge suggests filing items in chronological order starting with a couple's marriage and ending with their death. "As each of their children marries, a page is inserted directing the reader to a new binder starting with the marriage of that child," Rogge says. For old family photos, Pam Meyers recommends using a photo book or scrapbook, particularly for photos of gravestones (including pictures of the gravestone and the cemetery entrance).

3 Go digital.

To help reduce your paper files or to create electronic backup copies, scan your documents and photos.

There are lots of different scanners to choose from. For example, reader Julie Haynie recommends the Evernote ScanSnap scanner (\$495). She says this scanner lets you categorize documents as they're scanned, scans both sides of double-sided documents and scans up to 50 documents at once. Mark Bray uses a VuPoint portable scanner (prices vary by model).

To organize the digital files, consistency is key. "Consistency will make it easier to search/find things you are looking for," says Christine Emonds.

Start your digital organization with determining a structure for the digital folders—typically this may be a hierarchy of surname folders. Under the surname folder, you could create a subfolder with an individual's first name; under that, you could use a naming convention that includes the record type (or even another subfolder for record type such as Death Records, which may include an obituary, a death certificate and info from the Social Security Death Index).

Remember to create a standard way to name your files, too. Joy Blair puts her files in a surname folder, and then names her files like this: FirstName_Year_Month_Date_RecordType. Camille Mecham uses this naming convention: Who_When_Where_What.

Once you determine your structure and file-naming conventions, write it down and stick to it. "I have written an SOP—standard operating procedure—for my digital files. This way, I am saving photos and documents the same way and I will be able to find them," says Tina Telesca.

<div style="background-color: #0070C0; color: white; padding: 5px; font-weight: bold; font-size: 1.2em; text-align: center;">MORE ONLINE</div> <p style="text-align: center; color: #0070C0; font-weight: bold;">@</p> <p>Free Web Content</p> <ul style="list-style-type: none"> ■ Easy-to-use genealogy filing system <familytreemagazine.com/article/now-what-file-organization> ■ Get your research organized <familytreemagazine.com/article/win-the-paper-chase> ■ Organize your genealogy email <familytreemagazine.com/article/organize-your-genealogy-email> 	<p style="text-align: center; color: #0070C0; font-weight: bold;">+</p> <p>For Plus Members</p> <ul style="list-style-type: none"> ■ Be an organization wizard <familytreemagazine.com/article/be-an-organization-wizard> ■ Photo organization <familytreemagazine.com/article/feb-2012-photo-organization> ■ Scanner guide for genealogists <familytreemagazine.com/article/scanner-solutions-1> 	<p style="text-align: center; color: #0070C0; font-weight: bold;">\$</p> <p>ShopFamilyTree.com</p> <ul style="list-style-type: none"> ■ Genealogy Research Log Templates <shopfamilytree.com/genealogy-research-log-templates-t5480> ■ How to Archive Family Keepsakes e-book <shopfamilytree.com/how-to-archive-family-keepsakes-ebook-v6487> ■ Organize Your Photos independent study course download <www.shopfamilytree.com/organize-your-photos-w6458>
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ORGANIZE YOUR GENEALOGY
will help you bring order to the chaos of pedigree
printouts, paperwork. Conquer the clutter!
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Use universal file formats such as PDF or JPG when you save files, too. If your files aren't in those formats, you could keep the file in the original format, but then also convert it to a universal file format so that you can always access it, no matter how technology changes or which device you use to access it.

To avoid having duplicate copies of your digital records consider setting up a Microsoft Access database. April Earle uses an Access database to link a single record to multiple individuals (such as a birth record to the child and each parent). This database allows her to avoid duplicating digital images and documents she has. "It used to be I had a folder for every person in my family tree and a copy of every document that pertained to them. Thus, a birth certificate would be copied three times—one copy in the mother's file, one for the father's and one for the child's. Now I just have one copy of that document and a database that links that numbered document to those three numbered individuals." Access comes as part of the Office Professional 2013 software package (along with Word, Excel, PowerPoint, OneNote, Outlook and Publisher) and you also can purchase it as an add-on with an annual subscription.

Got piles of magazines and other periodicals you want to reference later? Create your own magazine index as you receive and read issues, so that you can return to articles on topics of interest to you. At Family Tree Magazine, we do this for you in each year's December issue. Another option for easy access to past Family Tree Magazine issues is our annual CD of issues. "Although I subscribe to Family Tree Magazine, I also buy the annual CDs of each year's issues," says Ken Bonvallet. "This is because it's easier to search for

Color coding can help you distinguish research about different family lines or types of records at a glance.



TIP: "When I add a census or directory document to my Family Tree Maker program, I change the place from just the city and state, to the entire address. Most of my ancestors stayed in the same city, but moved a lot during those census years. It helps me with my timelines and finding other relatives close by." » Pam Spittel

a topic on CD and much more thorough than the published end of year index. Then I go to the paper copy to read the article."

No matter what digital files you save and organization method you use, have a backup plan in case of technology failure or a natural disaster. This may include using an external hard drive, the free Dropbox <www.dropbox.com> app or a service that automatically saves your computer documents to the cloud, such as Backblaze <www.backblaze.com>.

4 Color-code folders and files.

Color-coding is a popular organization method for many Family Tree Magazine readers, and there are many different ways to color-code your files. Many readers recommend using a different colored folder for each surname. Anita Boynton says she color-codes each of her grandparents' lines and uses red, yellow, blue and green for paper and digital files. For paper files, she uses colored folders, pens, highlighters and stickers to sort and mark items. In Microsoft Outlook, she color-codes tasks and contacts so she knows which family line those items relate to. To learn how to set up color-coding in Outlook, watch this YouTube video <www.youtube.com/watch?v=4V2Vik7m9AY>.



Use Evernote to organize your genealogy notes and make them easily searchable. The free app also lets you save ancestor information you find online.

Kim Simpson groups each family in a hanging file folder, and then color-codes by family relationship: a blue folder for the husband, a red folder for the wife and a manila folder for each child.

To take the color-coding a step further, you could do what April Barr does, and print your notes and records on colored paper. For example, Barr uses purple for her father's side, so all the papers she prints—such as family group sheets—are printed on purple paper.

You can color-code your digital files and folders to match your paper files, too. On a Mac, click on a folder in the finder window and then click the down arrow next to the gear icon. From the drop-down menu, select Label and the color you want to use. Repeat these steps with individual files as well. Windows PCs don't have folder color-coding built-in, but you can download a color-coding program such as Folder Colorizer <softorino.com/products> or Folderico <www.folderico.com>.

5 Use a numbering system.

A numbering system also can help keep you organized. Janice Kessler uses a combination of numbers and letters in her organization system. "I labeled the oldest person in each family #1 with the spouse #1A. Children were listed in birth order beginning with #1a, 1b, 1c and so on. The next eldest sibling would be #2 and the spouse #2A with children 2a, 2b and 2c," Kessler says. Note that the spouses use uppercase letters and the children use lowercase letters.

Ahnentafel (German for "ancestor table") is a standard genealogical numbering system you can use to keep track of ancestors. An *Ahnentafel* chart shows how each ancestor is related to the root individual. The system gives each ancestor a number. Fathers are even numbers; mothers odd. To find a father's number, double the children's number. Add one to the father's number to get the mother's number. For example, if you are number one, then your father is number two and your mother is number three. Many genealogy software programs will automatically calculate the *Ahnentafel* numbers for you and create *Ahnentafel* charts you can print.

To keep track of sources, Howland Davis numbers all of his sources chronologically. Davis puts the source number in the upper-right corner of each document he files. He then compiles the list of sources in a single binder. If Davis needs to confirm a source of a document he's working with, he can simply go to the source binder. For example, the 1910 U.S. census may be source number 22. If Davis has a 1910 US census record for his grandfather and a separate record for his great-grandfather, both sources may be listed under number 22, but his grandfather may be listed as 22.i and his great-grandfather as 22.ii. The source citation will appear for each person.



TIP: When saving digital files, use universal file formats such as PDF or JPG as much as you can.



6 Take advantage of tech tools and apps.

Whether you need to track your online searches and record discoveries, store and access reference materials, share files with family or track e-books you've downloaded or purchased, you can choose from tons of tech tools and apps. Consider these for your genealogy work:

- **EVERNOTE:** *Family Tree Magazine* editors and our readers love Evernote <www.evernote.com>. This free web browser plug-in and mobile app helps you save and organize information you view online, as well as tag the information so you can search for it and find it later. For the power user, Evernote also offers a paid premium version for \$45 per year, which includes more storage capacity and enhanced searching capabilities within PDFs, photos and other documents. Another similar tool, OneNote <www.onenote.com>, also is available—it's part of some Microsoft Office software packages.

- **CALIBRE:** To keep track of the nearly 500 local history, family genealogy and other e-books Carolyn Robinson has downloaded, she uses Calibre <www.calibre-ebook.com>. "I like to use Calibre to organize all of these downloads, add tags for searching, etc.," Robinson says. Calibre is free, open-source e-book management software. The program helps you sort and track books in your e-book library and convert e-book file formats. It also syncs to e-reader devices and supports most major e-book formats.

■ **FLICKR:** Finding a good method to organize and share digital or scanned images can be tricky. Melissa Hull uses Flickr <www.flickr.com> for her photos. “I’ve scanned in all my parents’ and grandparents’ photos to Flickr.com. It only costs me about \$25 per year, and the photos are all safe if my house gets blown away by a tornado,” she says. Hull has created sets for each grandparent, aunt and uncle, and labels the photos with the ancestors’ names and other pertinent information. She also shares them with family members by sending them a link to a group of photos the family member is interested in.

■ **MICROSOFT EXCEL:** Spreadsheets are every genealogist’s friend. You can use Microsoft Excel to create research checklists, to-do lists (such as cemeteries to visit, microfilms to order, books to request through interlibrary loan) and contact lists for relatives and individuals you meet as you research. Ruth Meyers says you also could create a spreadsheet or table for each ancestor and input the information you’ve learned about him or her. She recommends inputting a photo of the person from different stages of their life as well as a tombstone photo so you have a snapshot of each ancestor’s life in a single place.



7 Create research on-the-go files.

Accordion files are great for corraling your research papers when you’re researching at a repository or visiting a cemetery. You can put surnames on the file’s tabs to sort information you collect.

Many readers also use index cards. “I found it best to have a notecard for each person/couple. This way you can include birth and death dates, marriage dates and the children they had and dates,” says LeAnn Salwey. “This way, you can keep track of everyone and add more cards as necessary.” The back of the card is great for jotting down source information or additional details.

Fill-in forms are also great on-the-go resources. Having a form with pre-determined categories to fill in as you find family info helps keep you focused and ensures you have all the information from the record you need—such as dates, names and the source citation information. Check out the Essential Family Tree Forms Library CD <shopfamilytree.com/essential-family-tree-forms-library-cd-t4063> for 75 type-and-save research forms and tracking worksheets.

8 Establish a workflow routine.

Maintaining an organization system may seem daunting, but if you regularly take short periods of time to put papers in the right place or scan papers, it becomes second nature. Once you return from a library research session, take a few minutes to file paper copies or scan them. If needed, set up an “inbox” in your office for items you need to take action on (scan, label, number, etc.) and a “to file” box for items ready for you to put away. If filing or scanning doesn’t fit in your schedule to do right away, consider Mark Bray’s strategy: He scans new documents he finds once each month.

If organizing tends to overwhelm you, Mary Ann Gauer recom-

mends setting a timer and working until it rings. Another option, suggested by Janet Black, is to file one piece of paper each day.

If you have doubles of records, shred or recycle the doubles and keep a checklist of what you have and don’t have for each ancestor, so you don’t duplicate your research efforts (and don’t duplicate records you already have).

9 Designate a workspace.

Having an organized workspace can help keep your genealogy files orderly, too. Richard Stock types and prints a table of contents and then attaches it to the front of each of his file cabinets. If he adds something to the cabinet, he handwrites it on the list. A few times a year, he’ll update the list and print a new copy.

If you’re like many of us, your genealogy workspace may double as a guest bedroom, dining room or other room in your home. Instead of relegating your files to a closet or storage room, you can find creative ways to incorporate your files into your home’s décor. For example, you could use antique tins, decorative hat boxes or pretty photo boxes to store letters, postcards and photos—just make sure they’re archival-quality containers. “Add a small, adhesive label to the bottom of the box or tin with a brief description of its contents and your guests will be none-the-wiser of its true purpose,” says Autumn Callahan. A decorative, framed family tree chart could hang on the wall as art.

In addition, be sure the desk you have works for your research needs. Sara Sowa recently got a new research desk and it’s made a world of difference. “I love my new desk. It has room for my books and computers, lots of drawers and slots for large and small items, plus a file folder drawer,” she says.

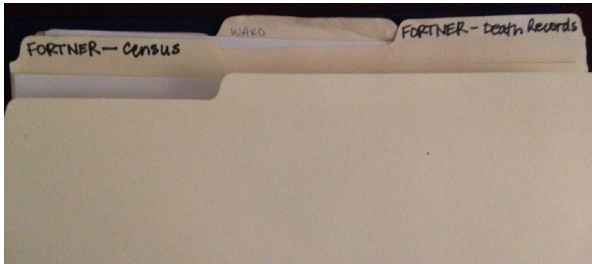
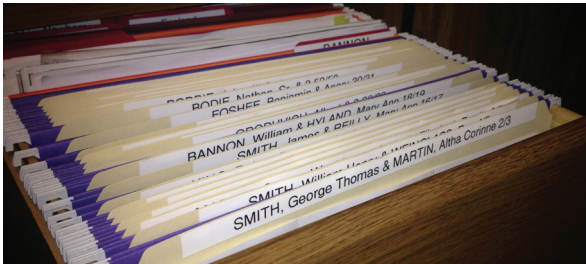
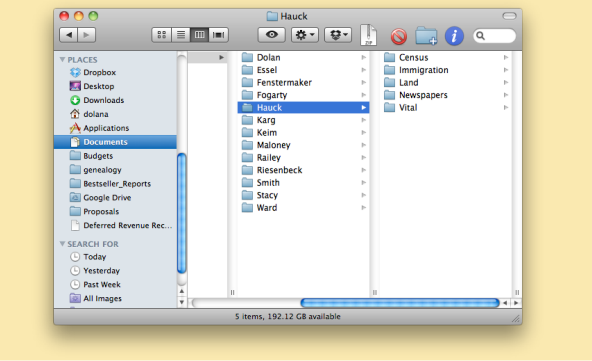
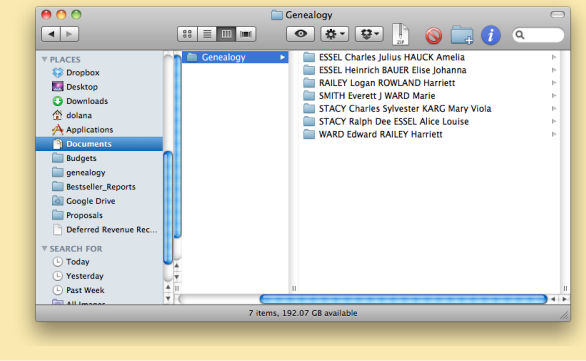
No matter what organization method you choose, the best thing you can do is find a method that’ll work for you, start using the method right away and stick with it. Future generations—and probably your spouse or housemate—will thank you. ■

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Top Two Filing Systems at a Glance

Genealogy filing systems can be as varied as the individuals who employ them—after all, the key to organization success is using the method that works for you. But many genealogists’ schemes are rooted in two tried-and-true systems: filing by surname and record type, or filing by ancestral couple (and their children, or “family group”). Compare these two systems to see which one best fits your working style. » **Allison Dolan**

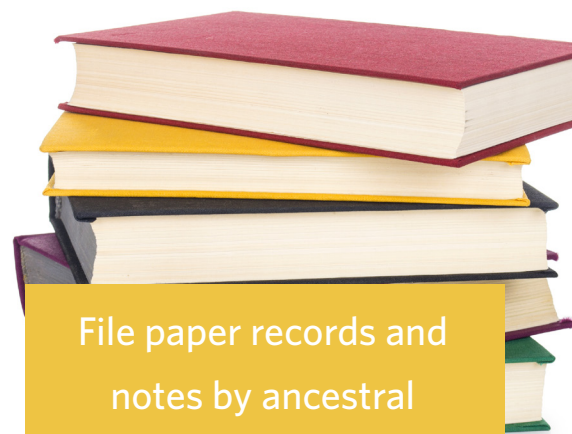
System	Filing by Surname	Filing by Couple
How it works	Create a folder for each ancestral surname. As a folder expands with new research material, divide items into separate file folders/computer subfolders for different record types, such as census, vital records, etc. Organize alphabetically by surname then record.	Create a folder for each couple. File all materials pertaining to the man, woman and their children inside. When a child marries, create a new folder and file all his/her materials after that date within the new folder for that union. Organize alphabetically by the man’s surname or by the numbers on your family tree chart.
Sample folder labels	<ul style="list-style-type: none"> ■ ESSEL: Immigration Records ■ STACY: County Histories ■ RAILEY: Land Records 	<ul style="list-style-type: none"> ■ ESSEL Charles Julius & HAUCK Amelia ■ SMITH Everett J. and WARD Marie C.
How it looks on paper		
How it looks on your computer		
Pros	<ul style="list-style-type: none"> ■ simple to manage when you’re getting started ■ system grows with your research ■ easy to customize beyond record groups 	<ul style="list-style-type: none"> ■ structure mirrors your family tree ■ consistent across all your research ■ minimizes duplication/cross-referencing of records of multiple people
Cons	<ul style="list-style-type: none"> ■ requires duplication or cross-references for records that apply to multiple surnames ■ doesn’t group materials about the same person together (though you can do this manually or with computer file names) 	<ul style="list-style-type: none"> ■ may need to look up family relationships to find a person’s paper materials ■ lengthy folder names ■ can’t use ampersands or plus signs in computer file names

Tips

- Create a contents list for each folder to find items within it faster.
- Color-code labels of affiliated surnames or family branches for easy identification.
- Put surnames in all caps to scan folder names quickly.

- For quick reference, include a family group sheet for that couple and their children at the front of a paper folder; within a computer folder, color-code the file or add a 1 to the start of the file name so it appears first in the list.
- Put surnames in all caps to scan folder names quickly.

6 Expert Ideas to Organize Your Genealogy Workspace



Adorn your workspace with photos, kids' artwork, genealogy conference badges and other mementos from your genealogy. These will serve as inspiration for your work.

» **Sunny Jane Morton**, author of *My Life & Times* and *Family Tree Magazine* contributing editor

Use a large monthly paper calendar for appointments and notes, and keep a running to-do list for each day or week. Set up a folding table for extra workspace as needed.

» **Maureen A. Taylor**, author of *Family Photo Detective* and *Family Tree Magazine* contributing editor

File paper records and notes by ancestral couple, with large labels for readability. Capitalizing the full last name helps, too. Add numbers to your labels that correspond to each ancestor's number on a pedigree chart.

» **Drew Smith**, co-host of the *Genealogy Guys Podcast*, librarian and author



Eliminate clutter by pulling out of your space anything that doesn't apply to your research. Color-code your paper and electronic materials. Colors work as reminders, whether you're writing on paper or adding to an online calendar.

» **Lisa Louise Cooke**, host of the *Genealogy Gems Podcast* and *Family Tree Magazine Podcast*

Carefully choose each piece of equipment and storage to maximize limited space. Place your computer monitor at eye level to reduce eyestrain, and keep printed material within easy reach.

» **Thomas MacEntee**, founder of *GeneaBloggers.com*

Arrange your genealogy bookshelf by category, region and research type to quickly find books you need to consult. Keep your work area comfortable and enjoyable — don't try to be too neat.

» **George G. Morgan**, co-host of the *Genealogy Guys Podcast*, author and *Family Tree Magazine's* Document Detective columnist



BIOGRAPHICAL OUTLINE OF THE LIFE OF

Record information on education, military service, marriage, children, illnesses, religious milestones, migrations, residences, jobs, family events, land purchases, court appearances, deaths and burials, etc.

DATE	AGE	EVENT AND PLACE	SOURCE

PRESERVE YOUR FAMILY'S TREASURES!



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- protect and pass on keepsakes
- organize photos, heirlooms and paperwork for future generations

How to Archive Family Keepsakes makes it easy to preserve and pass on your most treasured family photos, records and heirlooms.

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